

THE MUSICAL INSTRUMENTS TRADE

INTRODUCTORY

This trade comprises firms that were engaged wholly or mainly in the manufacture or repair of pianos, organs, and other musical instruments, gramophones and records.

The output of wireless apparatus is dealt with in the report on the Electrical Engineering Trade (*see* Part II).

Firms engaged solely in repair work and tuning were excluded from the Import Duties Act Inquiry for 1934. The figures recorded by these firms for 1935 and 1930 are given below.

	1935 £'000	1930 £'000
Value of work done (Gross output) ...	141	263
Cost of materials, fuel and electricity used ...	12	50
Net output ...	129	213
	No.	No.
Average number of persons employed ...	699	1,295
	£	£
Net output per person employed ...	184	164

Table I A.—General summary

Particulars	1935	1934	1930*	1924
Value of products (Gross output) ...	£'000 4,312	£'000 4,274	£'000 11,428	£'000 7,943
Cost of materials, fuel and electricity used ...	1,747	1,719	4,605	3,684
Amount paid for work given out ...	9	6	17	14
Net output ...	2,556	2,549	6,806	4,245
Average number of persons employed...	No. 11,230	No. 10,726	No. 22,969	No. 18,858
Net output per person employed ...	£ 228	£ 238	£ 296	£ 225
Number of returns ...	No. 143	No. 155	No. 223	No. 300
Number of establishments ...	143	155	223	300
		} † {	263	†

* The figures relate to Great Britain only, particulars of the small production in Northern Ireland not being available.

† Not available.

Table I B.—Firms employing not more than ten persons on the average

Particulars	1935	1930	1924
Number of returns received ...	No. 442	No. 458	No. 276
Average number of persons employed :—			
Males ...	2,068	2,065	1,213
Females ...	227	226	66
TOTAL ...	2,295	2,291	1,279
Number of firms not making returns ...	7	65	150

In 1924 the value of the gross output of the small firms making returns was 4.3 per cent. of the total, the principal items affected being organs (16.4 per cent.) and repair work and work done for the trade (21.5 per cent).

Table II.—Size of establishments in 1935

Size of establishment (average number employed)	Number of establishments	Gross output	Net output	Number of persons employed	Net output per person employed
	No.	£'000	£'000	No.	£
11-24 ...	78	400	255	1,283	199
25-49 ...	33	352	196	1,137	172
50-99 ...	23	591	316	1,626	194
100-199...	13	797	475	1,859	256
200-299...	3	401	206	731	281
300 and over ...	5	1,771	1,108	4,594	241
TOTAL ...	155	4,312	2,556	11,230	228

Table III.—Particulars of output, etc., in each of the principal areas of the United Kingdom

Area*	Number of establishments†	Gross output	Net output	Number of persons employed	Net output per person employed	
	No.	£'000	£'000	No.	£	
1 ...	1935	89	3,303	1,926	7,883	244
	1930	135	9,499	5,779	17,952	322
2 ...	1935	11	87	74	334	221
	1930	11	95	74	371	199
5 ...	1935	9	67	45	242	184
	1930	15	178	105	636	164
6, 10 and 11 ...	1935	9	113	69	414	166
7 ...	1935	4	62	38	201	188
8 ...	1935	9	295	153	710	216
9 ...	1935	6	277	169	989	171
6 to 11 ...	1935	28	747	429	2,314	186
	1930	33	1,306	658	3,160	208
14 and 15 ...	1935	8	32	26	164	159
	1930	7	32	23	126	183
Other areas ...	1935	10	76	56	293	193
	1930†	22	318	167	724	230
TOTAL ...	1935	155	4,312	2,556	11,230	228
	1930	223	11,428	6,806	22,969	296

* For particulars see page xviii.

† Number of returns for 1930.

‡ Excluding Northern Ireland.

Table IV.—Sub-divisions of the industry

Group	Number of establishments*	Gross output	Value of characteristic products	Net output	Number of persons employed	Net output per person employed
	No.	£'000	£'000	£'000	No.	£
Pianos, organs and parts—	1935	83	2,085	1,883	5,046	222
	1930	116	2,931	2,743	7,266	224
Gramophones and phonographs and parts, including records—	1935	12	1,839	1,710	4,681	244
	1930	46	7,928	7,798	13,480	350
Other output	1935	60	388	...	1,503	195
	1930	61	569	...	2,223	206
TOTAL ...	1935	155	4,312	...	11,230	228
	1930	223	11,428	...	22,969	296

* Number of returns for 1930.

PRODUCTION

Table V A.—Output of principal products

Kind of output	1935			1934	
	Quantity	Value	Entries	Quantity	Value
	No.	£'000	No.	No.	£'000
Pianos, complete :—					
Not automatic ("straight")	51,309	1,242	39	42,681	1,151
Automatic ("player")	292	13	12	447	19
Organs, not automatic, complete (including harmoniums)	194	222	23	193	239
Parts of pianos* :—					
Keyboard sets	40,940	90	4	31,752	71
Actions	51,740	150	6	...	262
Other parts (including strings)	...	135	19	...	...
Parts and fittings for organs and harmoniums (including perforated rolls for automatic pianos and organs)	...	20	15	...	22
Gramophones and phonographs, acoustic, complete	93,570	278	4	112,667	340
Parts of gramophones and phonographs :—					
Records	Th. doz.	2,089	5	Th. doz.	1,308
Motors and other parts	...	1,057	8	...	308
Stringed musical instruments and parts	...	322	5	...	20
...	...	25	5	...	...

Kind of output	1935			1934	
	Quantity	Value	Entries	Quantity	Value
Wood and metal wind musical instruments :—	No.	£'000	No.	No.	£'000
Piccolos, flutes, clarinets, flageolets, bassoons and cornets :—					
Complete	2,668	22	4	3,128	23
Parts and accessories thereof ... ..	...	5	3	...	5
Other wind instruments :—					
Complete... ..	3,532	35	3	3,710	31
Parts and accessories thereof ... ..	...	22	1	...	19
...	...	5	2	...	6
Total — Wood and metal wind musical instruments	...	89	...	...	84
Musical instruments not elsewhere specified :—					
Complete	10,974	51	8	6,539†	29†
Parts and accessories ... ..	...	37	6	...	42†
Repair work and work done for the trade‡ ... ..	...	373§	92	...	211§
TOTAL — PRINCIPAL PRODUCTS ... ..	...	4,104	...	...	4,106

* Excluding piano frames of cast iron or steel, for which see the Iron and Steel (Foundries) Trade (Part II, page 58).

† Corrected figure.

‡ See introductory paragraph (page 543).

§ Amount received.

The figures shown in the preceding table include the following output recorded by firms whose returns were made on schedules for other trades and are not, therefore, included in Table I A.

Kind of output	1935		1934
	Value	Entries	Value
Parts of pianos :—	£'000	No.	£'000
Other parts	15	2	2
Parts and fittings for organs and harmoniums	1	1	—
Parts of gramophones and phonographs :—			
Motors and other parts, except records	9	3	17
Musical instruments not elsewhere specified :—			
Complete	—	—	19
Parts and accessories	7	1	25
TOTAL	32	...	63

Table V B.—Output for sale of certain principal products, 1924-1935

Kind of output	1924	1930	1934	1935
Pianos, complete :—				
Not automatic ("straight")	No. 92,810	53,822	42,681	51,309
£'000 3,278	1,610	1,151	1,242	
Automatic ("player") ...	No. 2,400	2,951	447	292
£'000 252	187	19	13	
Organs, complete (including harmoniums)	No. 989	298	193	194
£'000 276	298	239	222	
Gramophones and phonographs :—				
Acoustic, complete	No. 278,195	783,100	112,667	93,570
£'000 900	2,510	340	278	
Gramophone and phonograph records... ..	Th. doz. 1,864	5,971	2,475	2,089
£'000 991	4,399	1,308	1,057	
All other principal products, including repair work and work done for the trade	£'000 2,216	2,177	1,049	1,292
TOTAL—PRINCIPAL PRODUCTS	£'000 7,913	11,181	4,106	4,104

Table VI.—Average values of goods produced, exported and imported

Kind of goods	Production (at factory)		1935 as a percentage of 1934	Exports (f.o.b.)		Imports (c.i.f.)	
	Average value			Average value	Average value		
	1935	1934	1935	1934	1935	1934	
Pianos, complete :—	£ each	£ each	Per cent.	£ each	£ each	£ each	£ each
Not automatic ("straight")	24.2	27.0	89.7	30.9	32.9	59.4	77.0
Automatic ("player")	45.1	43.3	104.1	*	*	*	*
Complete pipe organs	1,186.0	1,285.5	92.3	702.1	693.1	270.8	417.2
Parts of pianos :—							
Keyboard sets ...	2.21	2.22	99.3	}	*	*	*
Actions	2.89	3.09	93.8				
Complete gramophones and phonographs...	2.97	3.02	98.5	1.85	1.97	0.37	0.58
	s.	s.		s.	s.	s.	s.
Gramophone and phonograph records	per doz. 10.12	per doz. 10.57	95.8	per doz. 11.73	per doz. 12.52	per doz. 22.90	per doz. 24.41
Stringed musical instruments, complete	£ each	£ each		£ each	£ each	£ each	£ each
Piccolos, flutes, clarinets, bassoons and cornets, complete...	1.56	1.60	97.4	2.20	1.93	0.71	0.61
	8.30	7.44	111.5	2.34	3.21	1.77	2.22

* Recorded by value only.

Table VII.—Volume of Production, 1924-1935

Kind of output	Total production			Production index (1935 = 100)		
	1935 as returned	1934		1924	1930	1934
		As returned	At 1935 average values			
	£'000	£'000	£'000	Per cent.	Per cent.	Per cent.
Pianos, complete :—						
Not automatic ("straight")	1,242	1,151	1,033	181	105	83
Automatic ("player")	13	19	20	832	1,027	154
Organs, complete (including harmoniums)	222	239	221	277	156	100
Parts and fittings for pianos, organs and harmoniums	395	355	334	264	173	85
Complete gramophones and phonographs	278	340	334	277	923	120
Gramophone and phono- graph records	1,057	1,308	1,253	90	290	119
Parts of gramophones and phonographs	322	308	345	124	289	107
Stringed musical instruments, complete and parts (includ- ing strings)	25	20	20	255	211	80
Wind and other musical in- struments not elsewhere specified, including parts and accessories	177	155	172	125	100	97
Repair work and work done for the trade	373	211	205	109	87	88*
TOTAL	4,104	4,106	3,937	166	233	99*

* Owing to the exclusion of firms engaged solely in repair work and tuning from the 1934 Inquiry (see introductory paragraph, page 543), the 1935 base figures have been adjusted in calculating these indices.

Table VIII.—Production in relation to Exports and Imports

Kind of goods	Produc- tion	Exports	Propor- tion of produc- tion exported	Retained imports	Avail- able for use in the United Kingdom	Share of home market held by British goods
					No.	No.	Per cent.
Complete pianos, {	No.	No.	Per cent.	No.	No.	Per cent.
not automatic ... {	1935	2,870	5.6	1,109	49,548	97.8
1934	42,681	1,950	4.6	497	41,228	98.8
Complete organs (including harmo- niums) not auto- matic ... {	1935	103	53.1	20	111	82.0
1934	193	94	48.7	27	126	78.6
Gramophones and phono- graphs :—						
Acoustic, {	1935	71,698	76.6	2,524	24,396	89.7
complete {	1934	83,988	74.5	3,677	32,356	88.6
	Th. doz.	Th. doz.		Th. doz.	Th. doz.	
Records ... {	1935	431	20.6	6	1,664	99.6
1934	2,475	447	18.1	5	2,033	99.8
Piccolos, flutes, clarinets, flageo- lets, bassoons and cornets ... {	1935	3,537	...	3,637	...	...
1934	3,128	2,191	70.0	3,246	4,183	22.4
	Value (at factory)	Value (f.o.b.)		Value (c.i.f.)		
	£'000	£'000		£'000		
Parts and acces- sories of pianos and organs {	1935	25*	...	25	...	...
1934	355	16*	...	21	...	...

* Excluding parts of automatic pianos and organs, which are not recorded separately.

Table IX.—Other output of the Musical Instruments Trade

The value of the gross output of the firms whose returns were made on schedules for the Musical Instruments Trade was £4,312,000 in 1935 and £4,274,000 in 1934, of which £4,072,000 in 1935 and £4,043,000 in 1934 consisted of products included in Table V A. Particulars of the remaining items are shown below.

Kind of output	1935	1934
	£'000	£'000
Manufactures of metal, including wireless apparatus and radio-gramophones	179	144
Manufactures of wood	46	51
Other goods	15	36
TOTAL	240	231

MATERIALS AND FUEL

Table X A.—Materials, fuel and electricity purchased and used

Kind of materials, etc.	1935		1934
	Quantity	Cost	Cost
	Th. tons	£'000	£'000
Fuel and electricity used for all purposes :—			
Coal	16.5	20	} 1,719
Coke	1.9	3	
Heavy fuel oil	35	1	
	Th. B.T.U. (Kw.-hrs.)		
Purchased electricity	5,912	27	
All purchased materials and other fuel		1,696	
TOTAL		1,747	1,719

Table X B.—Consumption of coal, coke and electricity in 1935 and 1930

Kind of fuel	1935	1930
	Th. tons	Th. tons
Coal	16.5	46.3
Coke	1.9	4.6
	Th. B.T.U. (Kw.-hrs.)	Th. B.T.U. (Kw.-hrs.)
Electricity :—		
Generated in same works	3,550	10,124
Purchased	5,912	10,653
Total electricity consumed	9,462	20,777

EMPLOYMENT

Table XI A.—Average numbers employed in 1935 and 1934

Persons employed	Males		Females		Total	
	Under 18	All ages	Under 18	All ages	Under 18	All ages
	Operatives (average for the year)	921	7,456	561	2,442	1,482	9,898
Administrative, technical and clerical staff*	54	880	80	452	134	1,332
TOTAL	975	8,336	641	2,894	1,616	11,230†

* As at 12th October, 1935, and 13th October, 1934.

† See introductory paragraph, page 543. The total comparable with that for 1934 is 10,531.

Table XI B.—Operatives employed in one week in each month of 1934 and 1935 by firms furnishing returns in respect of the twelve months ended December

Mid week of*	Operatives employed		Monthly index†	
	1934	1935	1934	1935
January	4,558	5,550	85.4	108.1
February	4,762	5,505	89.2	107.2
March	4,893	5,066	91.6	98.7
April	4,982	4,836	93.3	94.2
May	5,050	4,681	94.6	91.2
June	4,633	4,536	86.8	88.4
July	4,534	4,663	84.9	90.8
August	4,846	5,066	90.8	98.7
September	5,408	5,463	101.3	106.4
October	5,602	5,567	104.9	108.4
November	5,654	5,370	105.9	104.6
December	5,613	5,299	105.1	103.2
Average for the twelve months	5,045	5,134	94.5	100.0
Proportion of total operatives represented	53.95	51.87	...	...

* For the ending date of each week see page xiv.

† Based on the estimated average for the year 1935.

Table XI C.—Average numbers employed, 1924-1935

Year	Operatives	Administrative, technical and clerical staff	Total
1924	17,118	1,740	18,858
1930*	19,100	3,869	22,969
1934†	9,352	1,374	10,726
1935	9,898	1,332	11,230

* Great Britain only.

† See introductory paragraph, page 543.

WAGES

Table XII.—Wages paid by firms furnishing returns of wages in 1935 and 1930

The aggregate amount of wages paid by firms furnishing returns of wages was £677,000 in 1935 representing 51.2 per cent. of the net output of these firms, the corresponding figures for 1930 being £1,070,000 and 40.9 per cent. The figures for these firms given below indicate the size of the sample and the extent to which it is representative.

Firms furnishing returns of wages	1935		1930	
	Aggregate	Proportion of trade	Aggregate	Proportion of trade
	£'000	Per cent.	£'000	Per cent.
Gross output... ..	2,366	54.9	4,418	38.7
Net output	1,322	51.8	2,616	38.4
Operative staff employed :—	No.		No.	
During mid-week of October :—				
Males	4,428	53.7	}	*
Females... ..	1,520	56.2		
Total	5,948	54.3	8,390	43.4
Average for the year	5,252	53.1	7,775	40.7
Administrative, technical and clerical staff	611	45.9	*	*
Number of establishments	68	43.9	...	...

* Not recorded separately.

COUNTRY TABLES (1935)

Note.—The figures given in the following tables relate only to firms whose returns were made on schedules for the Musical Instruments Trade.

Owing to the possible disclosure of information relating to individual firms, separate particulars for Northern Ireland cannot be given.

Table I.—General summary

Particulars	Unit	England and Wales and Northern Ireland	Scotland	United Kingdom
Value of products (Gross output) ...	£'000	4,280	32	4,312
Cost of materials, fuel and electricity used	"	1,741	6	1,747
Amount paid for work given out ...	"	9	—	9
Net output	"	2,530	26	2,556
Average number of persons employed ...	No.	11,066	164	11,230
Net output per person employed ...	£	229	159	228
Number of returns	No.	135	8	143
Number of establishments	"	147	8	155

Table II.—Output

Kind of output	United Kingdom*	
	Quantity	Value
	No.	£'000
Pianos, complete :—		
Not automatic ("straight")*	51,309	1,242
Automatic ("player")... ..	292	13
Organs, not automatic, complete (including harmoniums)* ...	194	222
Parts of pianos :—		
Keyboard sets	40,940	90
Actions	51,740	150
Other parts (including strings) ... ..	...	120
Parts and fittings for organs and harmoniums (including perforated rolls for automatic pianos and organs)* ...	...	19
Gramophones and phonographs, acoustic, complete	93,570	278
Parts of gramophones and phonographs :—	Th. doz.	
Records	2,089	1,057
Motors and other parts... ..	...	313
Stringed musical instruments and parts ... ..	...	25
Wood and metal wind musical instruments :—		
Piccolos, flutes, clarinets, flageolets, bassoons and cornets :—	No.	
Complete	2,668	22
Parts and accessories thereof ... ..	...	5
Other wind instruments :—		
Complete	} 3,532	35
Parts and accessories thereof		22
Parts and accessories thereof ... ..	...	5
Total—Wood and metal wind musical instruments ...	...	89

Kind of output	United Kingdom*	
	Quantity	Value
	No.	£'000
Musical instruments not elsewhere specified* :—		
Complete... ..	10,974	51
Parts and accessories ... ..	...	30
Manufactures of metal, including wireless apparatus and radio-gramophones ... ..	...	179
Manufactures of wood ... ..	...	46
Other goods ... ..	...	15
Repair work and work done for the trade* ... ..	...	373†
TOTAL—VALUE OF GOODS MADE AND WORK DONE ...	...	4,312

* The output in Scotland consisted mainly of "Repair work," the amount received being £19,000. Separate particulars of "goods made" (£13,000) cannot be given owing to the possible disclosure of information relating to individual firms, the headings affected being marked thus (*).

† Amount received.

Table III A.—Materials, fuel and electricity purchased and used

Kind of materials, etc.	Unit	England and Wales and Northern Ireland		United Kingdom	
		Scotland	United Kingdom	Scotland	United Kingdom
Fuel and electricity used for all purposes :—					
Coal	<i>Th. tons</i>	16.5	—	16.5	
	£'000	20	—	20	
Coke	<i>Th. tons</i>	1.9	—	1.9	
	£'000	3	—	3	
Heavy fuel oil	<i>Th. galls.</i>	35	—	35	
	£'000	1	—	1	
Purchased electricity	<i>Th. B.T.U. (Kw.-hrs.)</i>	5,867	45	5,912	
	£'000	27	*	27	
All purchased materials and other fuel	£'000	1,690	6	1,696	
TOTAL	£'000	1,741	6	1,747	

* Less than £500.

Table III B.—Consumption of electricity

Electricity consumed	England and Wales and Northern Ireland	Scotland	United Kingdom
	Th. B.T.U. (Kw.-hrs.)	Th. B.T.U. (Kw.-hrs.)	Th. B.T.U. (Kw.-hrs.)
Generated in same works	3,550	—	3,550
Purchased	5,867	45	5,912
Total	9,417	45	9,462

Table IV A.—Numbers employed in week ended 12th October, 1935

Persons employed	Males		Females		Total	
	Under 18	All ages	Under 18	All ages	Under 18	All ages
England and Wales and Northern Ireland :—						
Operatives	999	8,132	617	2,684	1,616	10,816
Administrative, etc.*... ..	54	860	80	443	134	1,303
Total	1,053	8,992	697	3,127	1,750	12,119
Scotland :—						
Operatives	20	119	4	21	24	140
Administrative, etc.*... ..	—	20	—	9	—	29
Total	20	139	4	30	24	169
United Kingdom :—						
Operatives	1,019	8,251	621	2,705	1,640	10,956
Administrative, etc.*... ..	54	880	80	452	134	1,332
TOTAL	1,073	9,131	701	3,157	1,774	12,288

* Administrative, technical and clerical staff.

Table IV B.—Operatives employed in one week in each month of 1935

Week ended	Males and females		
	England and Wales and Northern Ireland	Scotland	United Kingdom
January 19	10,155	133	10,288
February 16... ..	10,187	129	10,316
March 16	9,635	137	9,772
April 13	9,150	137	9,287
May 18	8,900	139	9,039
June 15	8,654	139	8,793
July 13	8,781	137	8,918
August 17	9,378	136	9,514
September 14	10,336	136	10,472
October 12	10,816	140	10,956
November 16	10,631	131	10,762
December 14	10,533	130	10,663
Average for the twelve months	9,763	135	9,898

Table V.—Firms employing not more than ten persons on the average

Particulars	England and Wales and Northern Ireland	Scotland	United Kingdom
	No.	No.	No.
Number of returns received	409	33	442
Average number of persons employed :—			
Males... ..	1,915	153	2,068
Females	186	41	227
Total	2,101	194	2,295